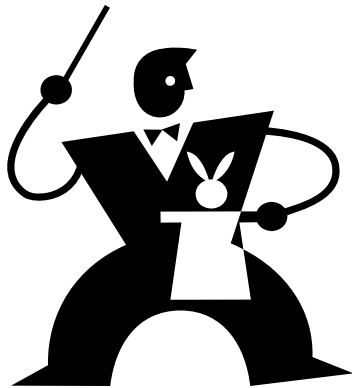


# Outlook 2003 Tips and Tricks



*Based on documentation developed at the University of Iowa  
Revised for Iowa State University Extension  
August, 2005*

ISU Extension Information Technology  
100 EIT Bldg  
Iowa State University  
Ames, IA 50011  
515-294-8658  
eit@iastate.edu

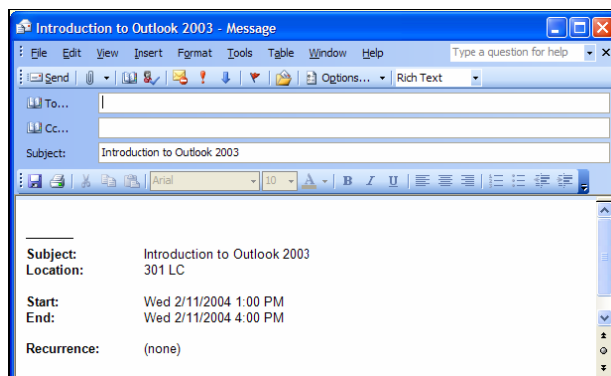
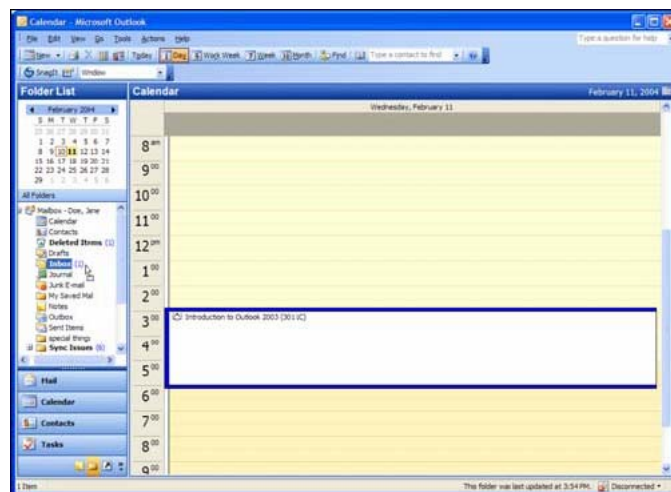
## Dragging Items Between Folders

In Outlook 2003, it is possible to drag items--messages, appointments, tasks, or contacts from one folder to another, thereby converting them to the item type of the destination folder.

You can drag any Outlook item from one folder to another; however, this Outlook feature is most frequently used for sending or generating new e-mail messages by dragging appointments, tasks, or contacts to the Inbox or for dragging e-mail messages to the Calendar, Contacts, or Tasks folders to create new appointments, contacts, or tasks.

### Dragging Appointments to the Inbox

To send an e-mail message regarding an appointment, drag the appointment from the **Calendar** to the **Inbox** folder listed in the **Navigation Pane** on the left.

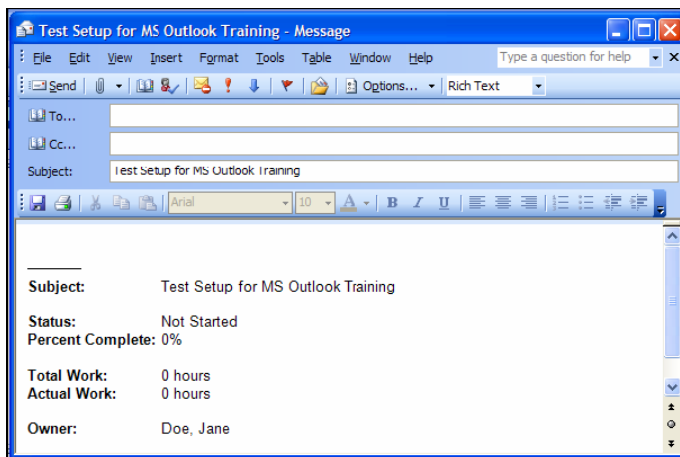
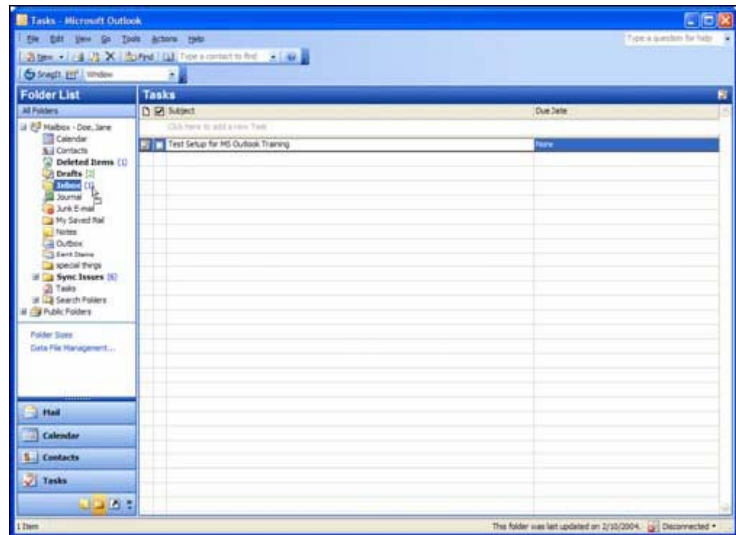


After you drag the appointment to the **Inbox**, a new e-mail message will be created, containing time, date, location, and any other information about the appointment that was entered when the appointment was created.

Type any additional information you want to include in your message, then address and send.

## Dragging Tasks to the Inbox

To send an e-mail message to someone regarding a task, drag the task from the **Tasks** window to the **Inbox** folder listed in the **Navigation Pane** on the left.

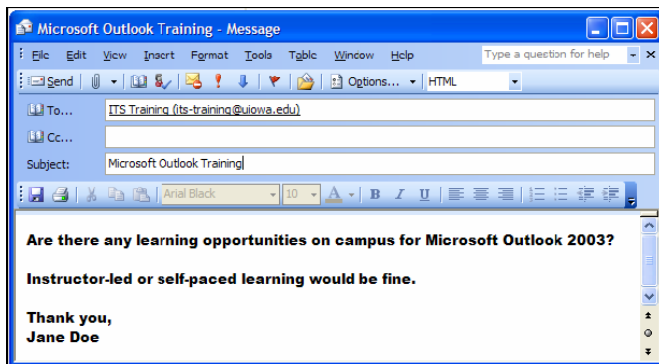
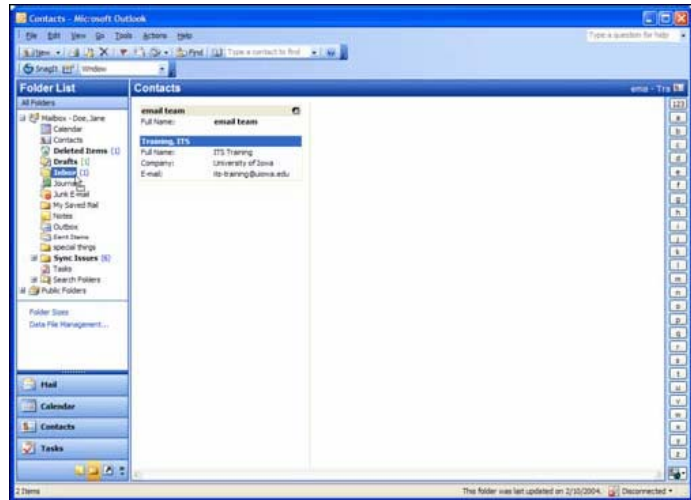


After you drag the task to the **Inbox**, a new e-mail message is created, containing subject, status, owner, and other information about the task.

Type any additional information you want to include in your message, then address and send.

## Dragging Contacts to the Inbox

To send an e-mail message to someone in your **Contact** list, drag that person's contact from the **Contacts** window to the **Inbox** folder listed in the **Navigation Pane** on the left.

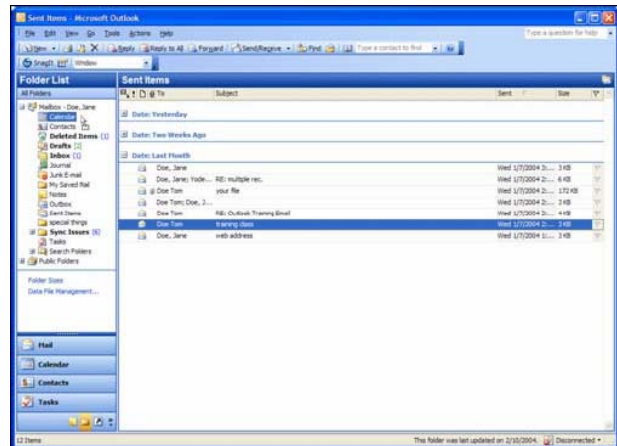


After you drag the person's contact to the **Inbox**, a new message will appear, addressed to that contact.

Type your e-mail message, type a subject line, and click the **Send** button to send your message.

## Dragging E-Mail Messages to the Calendar

To create an appointment based on an e-mail message, drag the message from the **Inbox** to the **Calendar** folder in the **Navigation Pane** on the left.

A screenshot of the 'training class - Appointment' form in Microsoft Outlook. The form is titled 'training class - Appointment' and has a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Actions', and 'Help'. The 'Appointment' tab is active, and the 'Scheduling' sub-tab is selected. The form contains the following fields:

- Subject: training class
- Location: [Dropdown]
- Label:  None
- Start time: Wed 2/11/2004 1:00 AM  All day event
- End time: Wed 2/11/2004 1:30 AM
- Reminder:  15 minutes  Show time as:  Busy
- From: Doe, Jane
- Sent: Wednesday, January 07, 2004 2:20 PM
- To: Doe Tom
- Subject: training class
- Tom,

At the bottom of the form, there are buttons for 'Contacts...', 'Categories...', and a 'Private' checkbox.

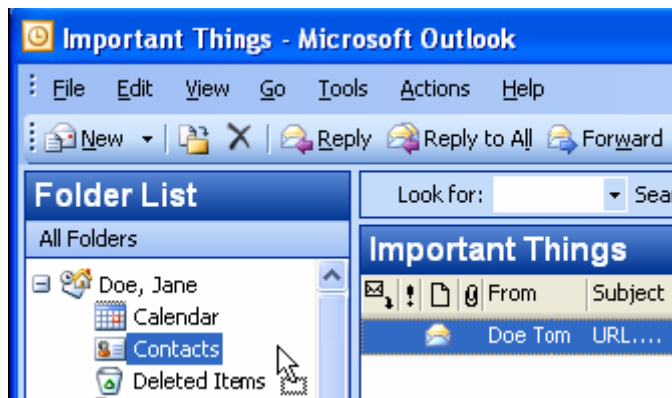
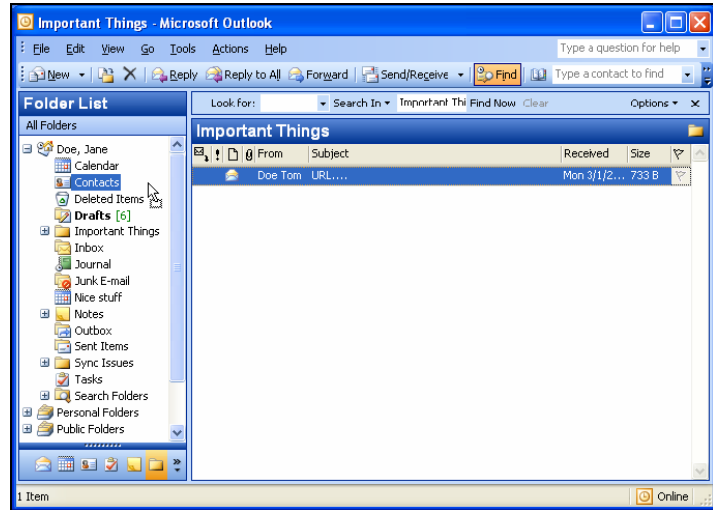
After you drag the message to the **Calendar**, a new appointment form will appear, with information from the e-mail message in the form's notes area.

Select a date and time for the appointment, along with any other information you may wish to enter about the appointment.

Click **Save and Close** to place the appointment in your calendar.

## Dragging E-Mail Messages to the Contacts Folder

To create a new contact based on an e-mail message you have received, drag the message from its mail folder to the **Contacts** folder in the **Navigation Pane** on the left.

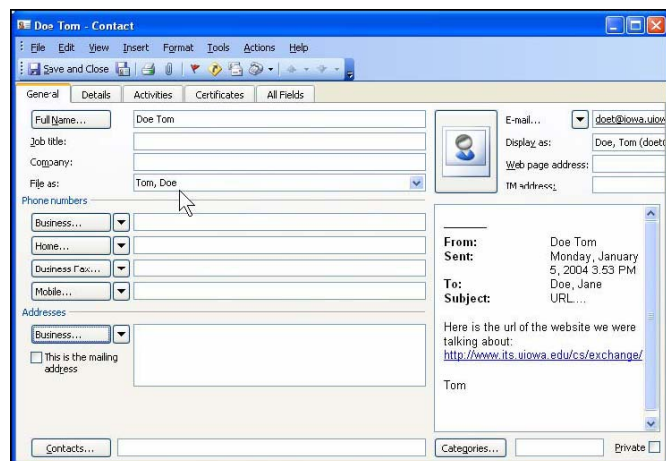


After you drag the message to the **Contacts** folder, a new contact form will appear, with information from the e-mail message, including the sender's e-mail address, which will be entered into the form automatically.

Enter name, address, telephone number, or any other information you have for the contact.

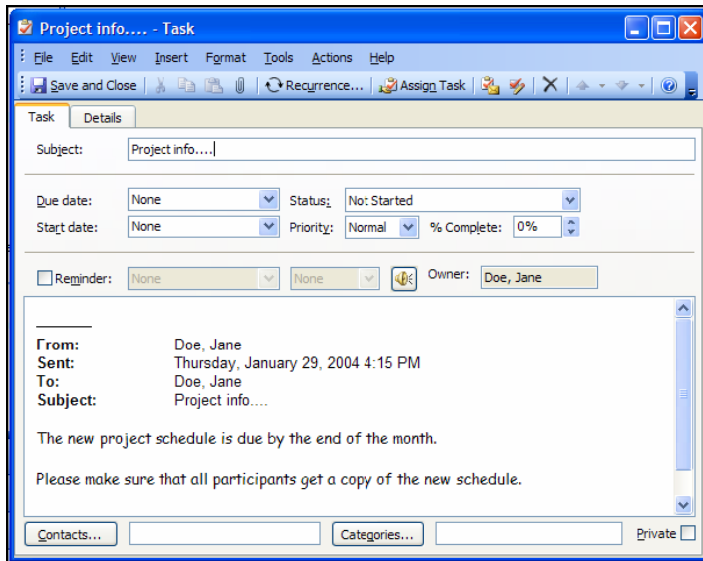
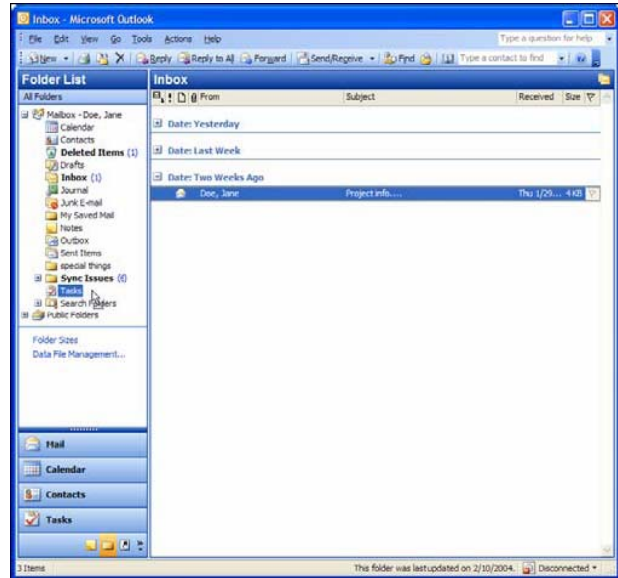
Although new contacts can be created with this drag and drop method, keeping the e-mail text within the notes area is optional.

Click **Save and Close** to add the contact to your **Contacts** list.



## Dragging E-Mail Messages to the Task List

To create a task based on an e-mail message you have received, drag the message from the **Inbox** to the **Tasks** folder in the **Navigation Pane** on the left.



After you drag the message to the **Tasks** folder, a new task form will appear with information from the e-mail message in the form's notes area.

Select a due date and a start date for the task, along with any other information you want to include about the task.


Click **Save and Close** to place the task in your task list.

## Creating and Using Distribution Lists

A personal distribution list is a collection of contacts organized into a list. Distribution lists provide a convenient way to send messages to a group of people.

For example, if you frequently send messages to a search committee, you can create a distribution list containing the names of all members on the search committee.

A distribution list is not the same as a mailing list that has been setup and maintained on a central server. An Outlook distribution list is setup and maintained locally--on your Exchange account only. Other people can't send messages to your Distribution lists. A message sent to an Outlook distribution list goes to all recipients listed in the distribution list. Recipients see their own name and the names of all other recipients on the To: line of the message rather than the name of the distribution list.

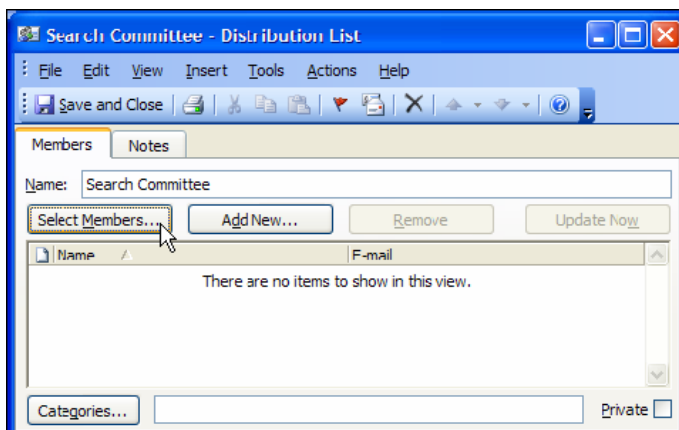
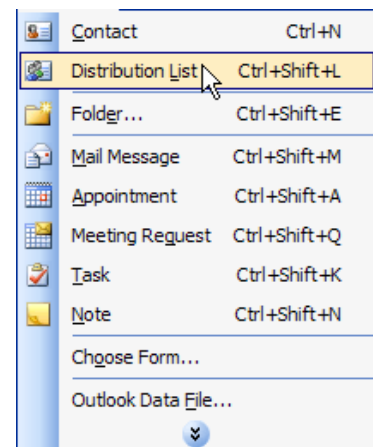
Personal distribution lists are identified with  and are stored in the Contacts folder.

### Creating a Distribution list

Display the **Contacts** folder.

Click on the arrow portion of the new toolbar button to view the drop-down menu.

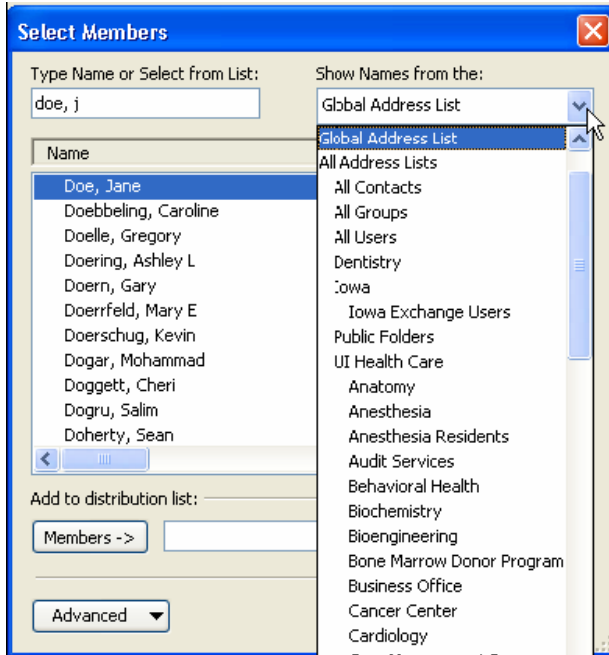
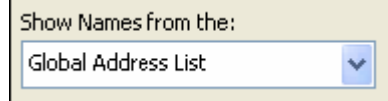
Select **Distribution List**.



In the **Name** box, type a name for the distribution list.

Click **Select Members**.

Under **Show names from the list:**, the default address book name will appear. Click the drop-down arrow if you also want to select names from additional address books.



Under **Type Name** or **Select from List**, type the last name of the person you want to add to your distribution list.

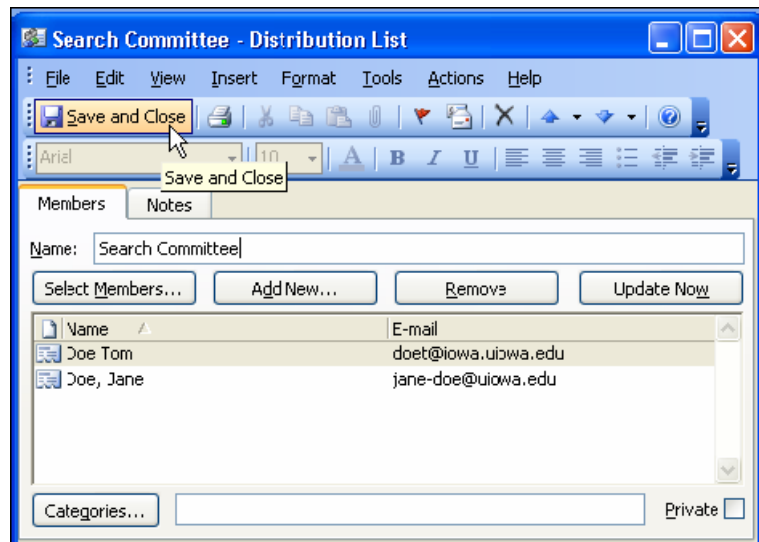
Click to highlight the person's name, click the **Members ->** button under **Add to distribution list**.

Repeat this process until all members have been added. Outlook will place semi-colons between the names as you select them (the default settings in Outlook). Click **OK**.

If you want to add a description of the distribution list, click the **Notes** tab.

Click **Save and Close** to save the distribution list.

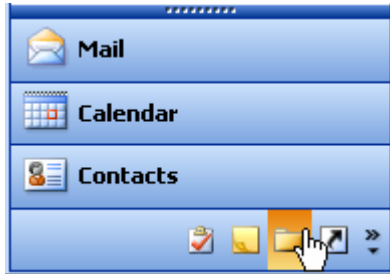
The distribution list is indicated by a special icon and will be saved in your **Contacts** folder.



## Sending E-Mail to a Distribution List

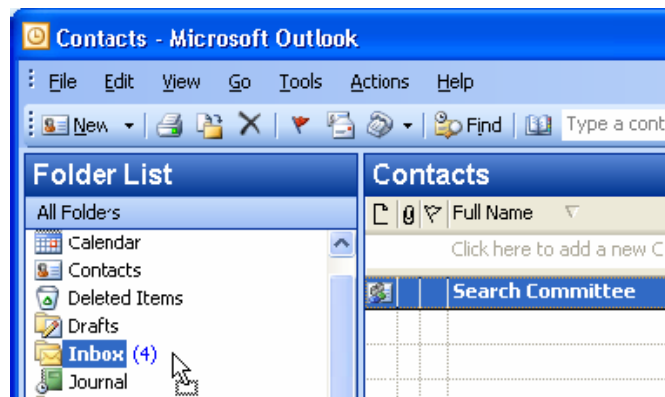
There are several ways to address a message to a distribution list. Three possible methods are listed below.

### Dragging a Distribution List to the Mail Folder--OR--the Inbox Select **Contacts** from the **Navigation Pane** (or from the **Go** menu)

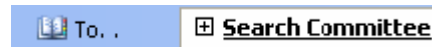


Select **Folder List** from the **Navigation Pane** (or from the **Go** menu)

Click and drag the distribution list name onto the **Inbox**, until the **Inbox** is highlighted. Release the mouse button.

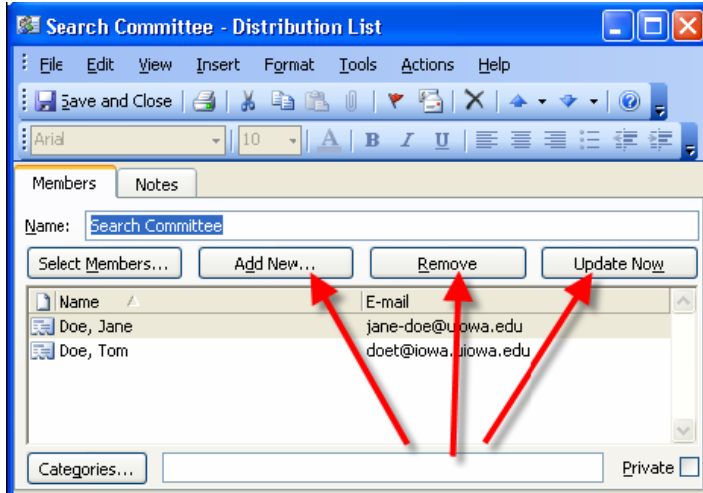


A new mail message opens, displaying the distribution list name in the **To...** field. (See example)




## Sending Messages from Within the Distribution List

Display the **Contacts** list. Double-click the distribution list name, opening the Distribution List dialog box.



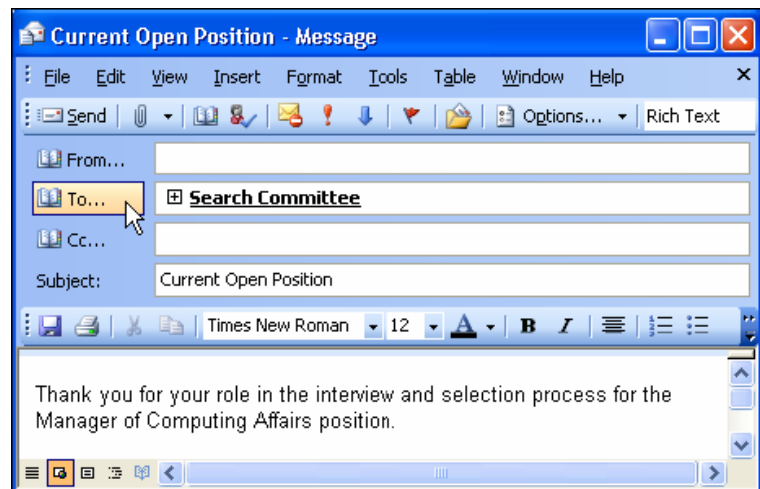
Verify the member names. To modify the list, choose the **Add New**, **Remove**, or **Update Now** button.

From the **File** menu, choose **Save** (rather than **Save and Close**) to keep the Distribution list open

Click on the  **New Message to Contact** button on the toolbar.

A new mail message will open. The distribution list name will be displayed in the **To...** field.

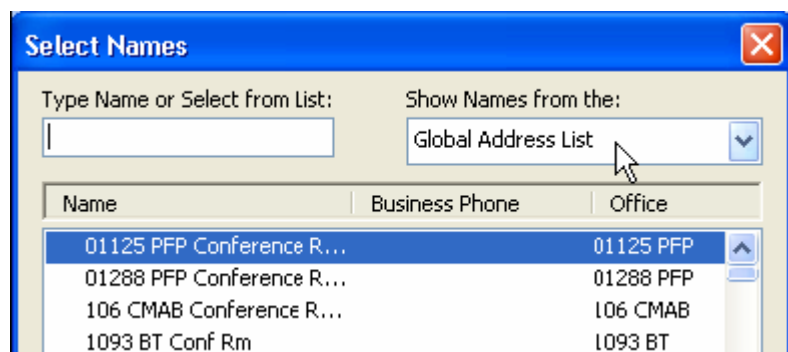
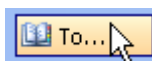
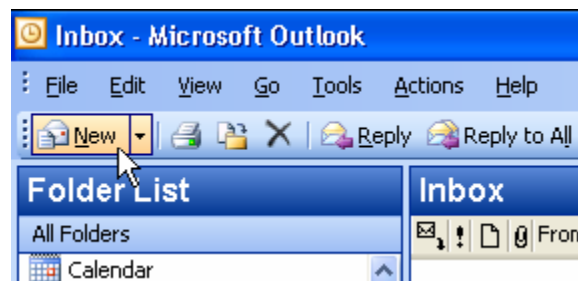
Clicking on the plus sign will display the individual names in the distribution list.



Compose the e-mail message and click **Send**.

## Sending Messages from within the Inbox

Display the **Inbox**, click the **New** button to create a new message, and type the name of the distribution list in the **To...** box.

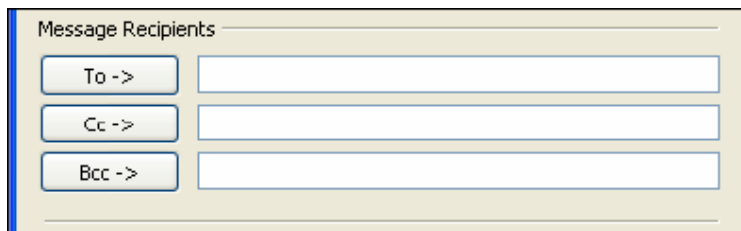


Enter the distribution list name in the **Type Name** or **Select from List** box.

To locate departmental distribution lists, click the **To...** button and locate the distribution list from the Global Address Book.

Click to highlight the list name.

Under **Message Recipients**, click the **To**, **Cc**, or **Bcc** buttons, placing the distribution list name in the appropriate address field.



Compose the e-mail message and select **Send**.

## Setting Message Handling Options

By default, when you move or delete an open message in Outlook, you are automatically returned to the mailbox you are currently working in.

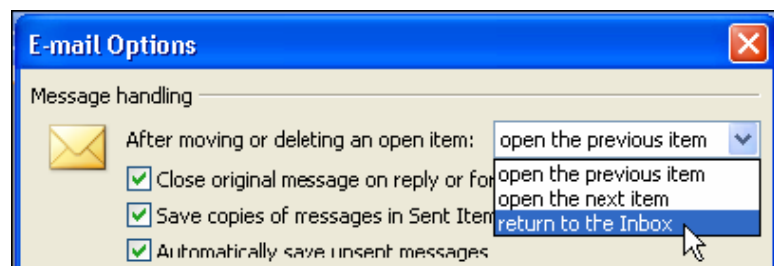
You may choose to configure Outlook to **Open the previous item** or **Open the next item** after moving or deleting an open item.

To set the Outlook E-mail Options, do the following:

On the **Inbox** toolbar, click on **Tools**.

Select **Options** from the **Tools** menu and click on **E-Mail Options**.

In the dialog box under **After moving or deleting an open item**, click the drop down arrow and select from the list.



Click on **Return to the Inbox**.

Click **OK**.

## Closing Original Message After A Forward or Reply

By default, when you reply to or forward a message in Outlook, the original message remains open after you send the reply or forwarded message.

You may find it more convenient to have the original message automatically close after the reply or forwarded message is sent.

To set Outlook up to close the original message after a forward or reply.

On the **Tools** menu, click on **Options**.

On the Preferences tab, click on **E-mail Options**.

In the E-mail Options dialog box, under **Message handling**, select **Close original message on reply or forward**.




Click on **OK** to close the E-mail Options dialog box.

Click on **OK** to close the Options dialog box.

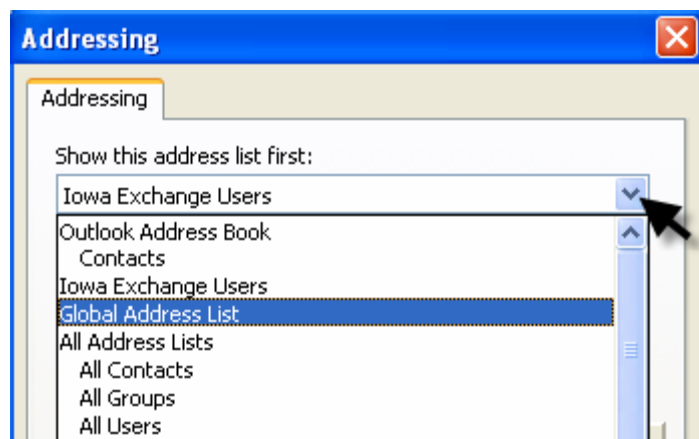
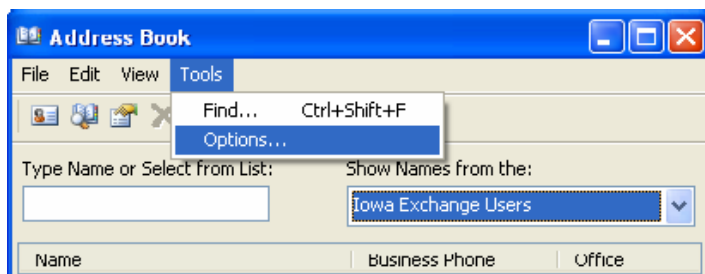
## Selecting a Default Address List

If you click on the To: button when you are creating a new message, Outlook will display an address list for you to choose the e-mail addresses you want to send your message to. On most PCs, the Global address list will appear by default.

If you want to change the default address list, do the following:

With the **Inbox** open, click on **Address Book**  in the toolbar

When the **Address Book** dialog box is displayed, click on the **Tools** menu and select **Options**.




Click on the down arrow under **Show this address list first** to see a list of available address lists.

From the drop-down list, select the address list you want to use for your new default.

Click **OK**.

## Using E-Mail Signatures

### Creating an E-Mail Signature

- Click on the **Tools** menu, select **Options**. Click on the **Mail Format** tab.
- Select the **Signatures** button.
- Click **New**.
- Under **Enter a name for your new signature**, type the name you want to save this signature as.
- Under **Choose how to create your signature**, select **Start with a blank signature**.
- Click **Next**.
- Create a signature in the **Signature text** box. Edit the format if necessary. Remember that short signatures are preferable to lengthy ones.
- To change the paragraph or font format, select the text, you want changes to apply to, click on **Font** or **Paragraph**. Select the options you want to change. Click **OK**.
- Click **Finish**.
- Click **OK** to close the **Create Signature** window.
- After you have created your signature, you can also modify Outlook's default signature setting of **None**  to use your new signature as the default in any e-mail messages you send.
- Outlook 2003 allows you to make separate signature settings for new messages versus message replies and forwards. In the **Signature for new messages** box, use the drop-down arrow and select the signature you want to use as your default e-mail signature.
- To set a default signature for message replies and forwards, select the **Signature for replies and forwards** drop-down arrow and select the signature you want to use.
- Click **OK**.

NOTE: A different signature can be selected for an individual message by right-clicking on the signature that's currently in the message and selecting a different one from the drop-down list, or by choosing E-mail signature to create a new signature.

### Inserting a Signature in a Message

- Create a new e-mail message.
- Position the cursor where you want the signature to appear.
- Click on the **Insert** menu and select **Signature**.
- Click on the signature you want to insert.

### **Deleting an E-Mail Signature**

- Click on the **Tools** menu. Select **Options**. Click on the **Mail format** tab.
- Click on the **Signatures** button.
- Click on the signature you want to delete.
- Select **Remove**.
- Click **Yes**.
- Click **OK**.
- Click **OK** again to exit **Options**

## Reading Your E-Mail via the World Wide Web

Your Outlook e-mail may be accessed from anywhere in the World if you have a computer with Internet access and web browser software.

### Logging on to Outlook via the Web

Launch your web browser

In the **Address** box, type:  
*exchange.iastate.edu*

When the 'Connect to exchange.iastate.edu' window opens, type your **Net-ID** for User name: and your regular password for **Password:**

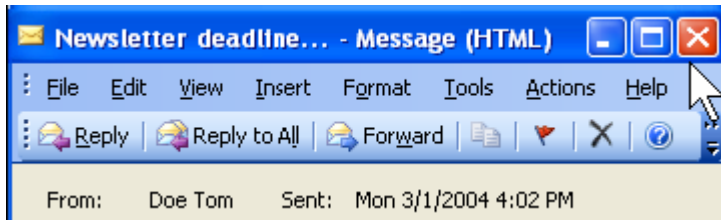
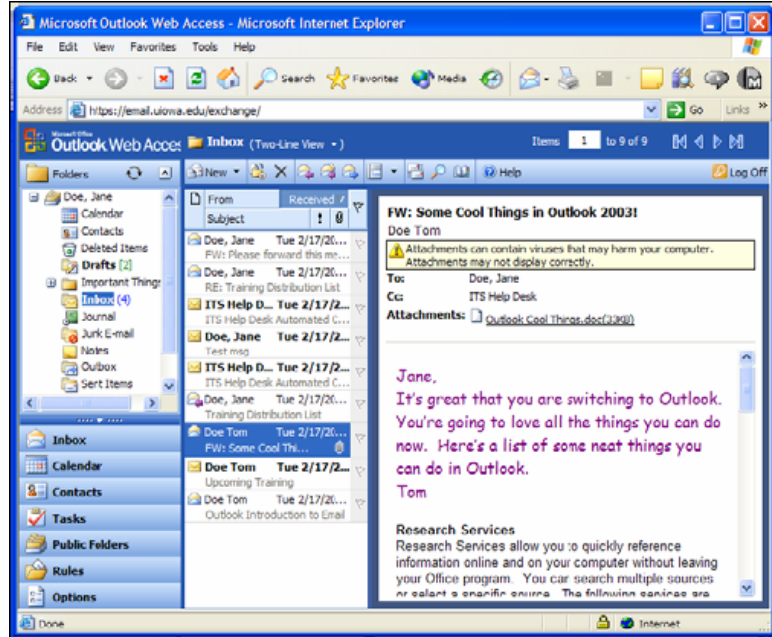
Click **OK**.



## Reading your E-Mail

To open an e-mail message in your **Inbox**, double-click on the name of the sender.

NOTE: In the image to the right, messages can also be viewed in the **Reading Pane**, without opening the message.



To close a message after you read it, click on the **Close** button in the message window.

The OWA Inbox toolbar will look like:



To reply to the sender of a message while the message is open, click the **Reply** button.



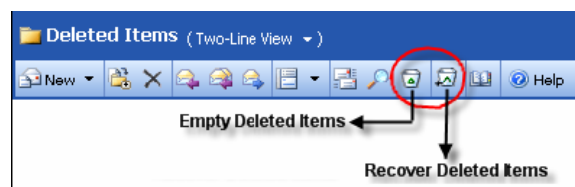
To reply to all recipients of a message while the message is open, click the **Reply to all** button.



To forward a message while the message is open, click the **Forward** button.



To delete a message in the **Inbox**, click the **Delete** button. Once deleted, messages are moved to the **Deleted Items** folder.



To read opened messages in a sequence, click the **Previous Item** or **Next Item** button.

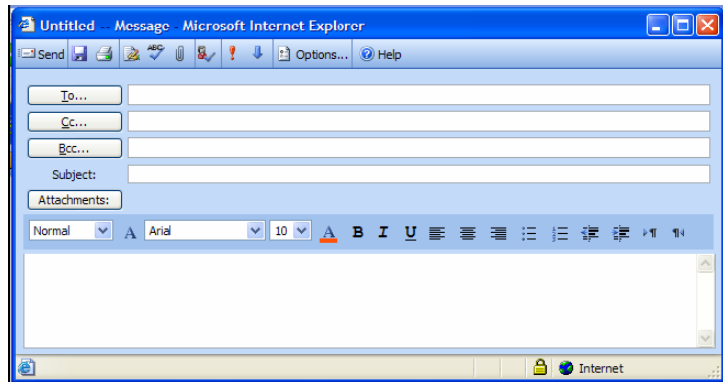


## Creating and Sending a Message

With the Inbox displayed, click the **New** button.



When the new message form appears, enter an e-mail address in the **To:** field, an address in the **Cc:** field (if needed), a subject, and your message.



After addressing and composing your message, click the **Send** button to send your message.

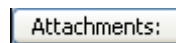


## Sending Attachments

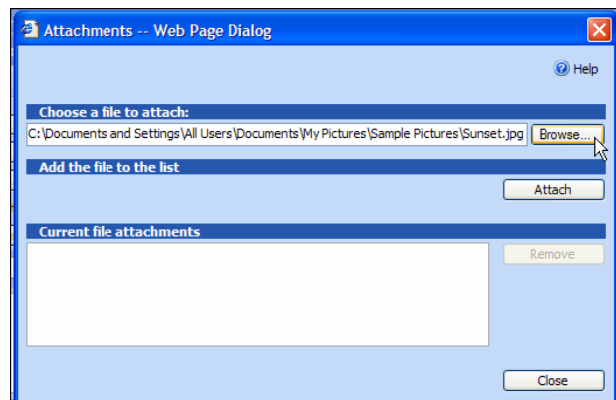
With the Inbox displayed, click the **New** button.



Follow the instructions above for **Creating and Sending a Message**. To attach a file to the message you've just created, click the Attachments button or paper clip icon.



In the **Attachments--Web Page Dialog** window, click the **Browse** button to locate the file you want to attach.

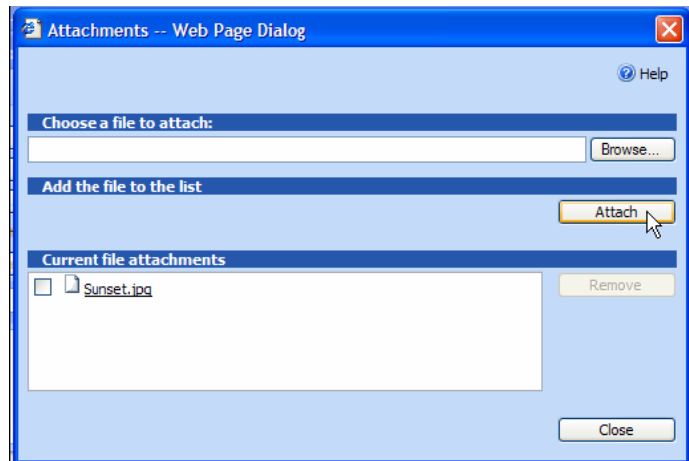


Once you've selected the file, the pathname for the file's storage location will appear in the **Choose a file to attach** box.

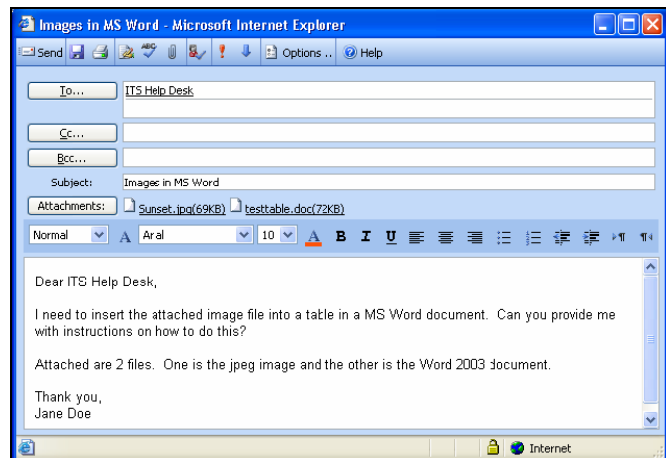
Click the **Attach** button under **Add the file to the list**.

The file name(s) will appear in the **Current file attachments** box.

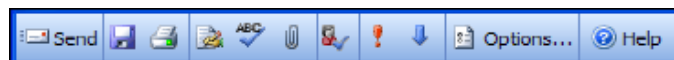
Click the **Close** button to complete the attachment process.



Once the Attachments dialog box is closed, the attachment name(s) will appear beside the **Attachments** button in the **Message** window.



After addressing and composing your message, click the **Send** button to send the message.



## Exiting the Outlook Web Access Client

Click the **Log Off** button on the right portion of the screen.

